Instructions For INCOME AND EXPENSE DECLARATION

WHEN TO USE THIS PACKET

The Income and Expense Declaration is required anytime the parties go to court regarding spousal support or attorney's fees. In hearings regarding only child support, the parties may file a Simplified Financial Statement (FL-155) instead of an Income and Expense Declaration, as long as the party is not self-employed.

This packet includes an "Income and Expense Declaration" [FL-150]. An Income and Expense Declaration may also be required when completing the Declaration of Disclosure and Settlement Conference Statement, or if ordered by the court.

An Income and Expense Declaration must be submitted with copies of the two most recent months' pay stubs. If you are self-employed, you must attach the last two years' income tax returns—including Schedule C (profits and loss statements). Be sure to blacken out any social security numbers that may appear on your pay stubs or income tax returns. You should take your tax returns to court just in case the court demands them. This may save you an additional court date by avoiding the necessity to continue the hearing to a different date.

There is no fee for filing the Income and Expense Declaration.

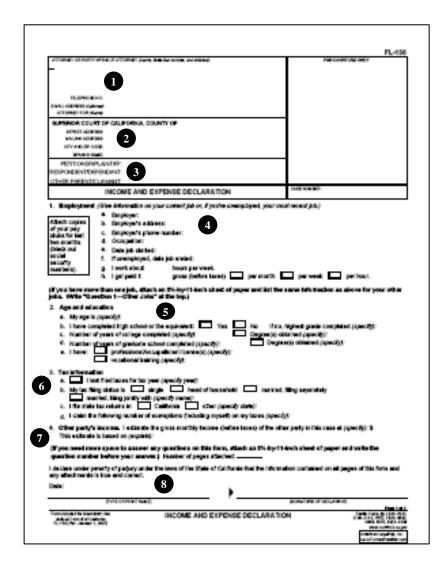
Once the Income and Expense declaration is completed, make copies for each of the parties (i.e., one for you, one for the other party, and one for DCSS if they are involved in your case). The original is filed with the court; a copy must be served on each party by having someone, other than you and over the age of 18, mail or personally serving the other party with a copy. A Proof of Service must be completed by the person who serves the Income and Expense Declaration on the other party and that Proof of Service must be filed with the court.

If you have any further questions, please contact the Fresno Superior Court Self-Help Center for further assistance. This service is free.

Instructions

With

Sample Forms



How to fill out

INCOME AND EXPENSE DECLARATION (FL-150)

DIRECTIONS

- Find the number on the sample form. *Example*: **1**
- Go to the same number below to find out how to fill out the form.
- ▶ Type or print in black ink
- If you know the CASE NUMBER fill it in. If not known leave it blank.

- 1 Print your name, address and phone number.
- 2 If not filled in for you, write "Fresno" after COUNTY OF. The address is: 1100 Van Ness Ave., Fresno CA 93724-0002. The Branch Name is: Central Division.
- Fill in the names of the Petitioner/Plaintiff and Respondent/Defendant. (The Plaintiff is the person that starts a case against another person, the Defendant.) Fill in name(s) of Other Parent/Claimant if it applies to this case.
- Fill in information about your job. If you don't have a job, fill in information about **your last job**. If you have more than one job, use another sheet of paper and write the information requested for each additional job.
 - Fill in the name (a) of where you work, the address (b) and phone (c), and your job title (d), example: driver.
 - Fill in the date you started this job (e). If you are unemployed, write the date your job ended (f), how many hours you work(ed) every week (g), and how much money you get paid before taxes are taken out (h). Check the first box if this is a monthly amount, the second box if weekly, or the third box if hourly.
 - Be sure to include copies of your pay stubs for the last two months. Use a dark marker to cross out your social security number.
- 5 Fill in your age (a) and check the "Yes" box if you finished high school (b). If you check No, fill in the last grade you finished. Fill out (c). or (d) if you have taken college classes. Fill out (e) if this applies to you.
- 6 Check box (a) and fill in the year of your last tax return. For (b), check the box that applies to you. For (c), check California OR check "Other" if you last filed taxes in another state, and write the state's name. For (d), write the number of "exemptions" you claim when filing your taxes.
- 7 Write down the total amount the other person in this case makes in a month, and explain how you know this.
- 8 Fill in the date, type or print your name on the left, and sign on the right.

	PETTONBORANTEP SPONGENTGENDONT THE PRENTGAMENT	GILLWEIN	R-49
	ch copies of year pay stales for the last two months and proof of any other in- return to the court heading, (filest) out your social security remoter on the pay		et federal
1.	become (For average month), add up of the boune you received in each category and discle the tide by (2)		Average D. modifier
10	g. Salery or weges (gross, before issue).		
	b. Overfirm (gross, before town)		
	c. Cummissions or buruses.		
	d. Public assistance (for example: TANF, SSI, GA/SF). Currently receiving		
	 Spound support from this markets from a different markets 	4	
	* Patrer apport tun tiús domedis petrentip tun e differen	domestic partnership 5	
	2 Panelso/Ackerment ford payments		
	5. Social mounty referenced (not 880)		
	Disposity: State descript (will \$80). State disposity (\$20).		
	j. Unempkyment compensation		
	k. Wukuri conpersation		
	Other (nattery BAG, reyetly payments, etc.) (apecity):		
4.	investment income (Atlanti e achedule abundag group receipts inco canti-expense.	for each piece of property.)	
	a. DMMedsiriand		
D	b. Romai property income		
	c. Trust income. d. Other (specifi):		
	(44)		
У.	is come from self-employment, after la <u>ndouse</u> expenses for all b <u>asis</u> excess		
	i en tire 🔛 overeitste proprietor 🔛 business perinar 🔛 etter (ap	MO(0):	
2)	Number of years in this business (specify):		
	Home of Euriteen (April): Type of Indiana, (april):		
	Attach a profit and loss statement for the test fron years or a flutedoile C from social security number. If you have more than one business, provide the lefe		
#.	 Additional income. I received one-time money (other) wherings, inheritance amount: 	, etc.) in the last 12 months (apec	ily accrete and
	Change in income. My financial startion has changed significantly over the	lasi 12 months because (specify	t .
10.	Deductions		Lastmeré
	s. Regard wise data		
4)	 Regard not exect payments (not social security, PICA, 491(0), or PIV). 		
	 Medical, hospital, dental, and other health insurance premiums (total mouthly er 		-
	4. Child support that I pay for dillaters from other relationships.		
	e. Special support that I pay by court order from a different manage		
	 Pather support that I pay by coult order from a different demertic pathernisp. Necessary job-related expenses not retributed by my employer pathern explain 		
	Austa		Total
	 Cash and disciding accounts, savings, credit union, money market, and other de- 	poult eccounts	
	5. Stocks, bonds, and other secrets I could easily set		*——
	Stocks, bonds, and other sensits could usually said All other property.		::=

INCOME AND EXPENSE DECLARATION (FL-150)

- page two -

DIRECTIONS:

- Find a number on the sample form *Example:* 9
- Go to the same number below to find out how to fill out the form
- ▶ Type or print in black ink
- ▶ If you know the CASE NUMBER fill it in. If not known leave it blank.

- 9 Print out first and last names for you and the other person(s) in this case.
 - Include your pay stubs for the last two months with this form. Also include proof of any other money you make. Bring a copy of your last federal tax return with you to the court hearing. Use a black marker to cross out social security numbers.
- Fill out a. through k. if it applies to you, and check any boxes that apply to you. The first column is for money earned last month. For the second column, add up amounts for the past 12 months then divide by 12 to get the average amount.
- If you have investments, fill in amounts. If you fill in an amount for d., write a description. If you have property, include a separate page that lists total money earned on the property and expenses.
- Fill out this section only if you are self-employed (own a business). Include a "profit and loss statement" for each business, or a schedule C from your tax return.
- Check "Additional Income," if you received extra money in the last 12 months. Write down the amount and where the money came from. Examples: "I won the lottery." "My uncle left me money in his will."
 - Check "Change in Income," if the amount of money you normally receive has changed a lot during the past 12 months. Write down the reason. Examples: "I got hurt on the job and am now on disability." "I got a new job that pays better than my old one."
- Fill in amounts deducted (taken away) from your earnings last month. Fill out all that apply. If you fill out (f), you must write an explanation on a separate page labeled "Question 10f."
- List your assets (accounts, stocks and bonds, property, etc.). Put in the total value (worth) for each line listed.

OTHER PWIENTICLAMANT:		16			
12. The following people live with a	nes				
Name	Age	related to mark year and	men per	ncare ments green	Pays some of the household expenses?
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6.	- 1	1	1		Yes Ho
4	- 1	1	1		Yes Ho
		'			
 Average monthly expenses Hone: 	Estin			es Prop	
				ring	
(f) Peri or or or or fine or page.	жукун э-				
(A) everage principal: 5 -		18 k. Enters	dwed, gt	Sc, and vecation	5
(i) everage interest: 5-				d transportation	
(2) Reciproperly taxes	········· 3.			epairs, but, etc.	
(3) Hameowner's or renter's in (first industed above)	manana .			oldert, etc.; der e., er heelik inst	
(8) Maintenance and repair				streets	
b. Health-care corts not paid by i				dire	
c. Child care		p. 140101 (2000)	y payment a babw is	s listed in them 1 14 and isset his	eliterel - s
d. Gracefes and household supp		4 000	(приступ.		5
e. Edigot				EEE (a-c) (do so	E-MID
f. Utilies (gas, etechts, webs; to	nd) 9-	- Dear	rounts is e	Oper and (SI)	,
g. Telephone, cell phone, and e-c	nei ş	s. Arres	art of cope	ores poid by a	Chert 5
14. Installment payments and debts	est listed abo				
Paidto	For		mound	Belance	Date of last payme
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15. Allegania Press (This is accorded to	Mar native -	our files allowance for a la		•	
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INCOME AND EXPENSE DECLARATION (FL-150)

- page three -

DIRECTIONS:

- Find a number on the sample form *Example:* 16
- Go to the same number below to find out how to fill out the form
- ▶ Type or print in black ink
- If you know the CASE NUMBER fill it in. If not known leave it blank.

- 16 Print out first and last names for you and the other person(s) in this case.
- 17 Give information about all persons who live with you.
 - Write their names, ages, and how they are related to you (parent, child, other relative, friend).
 - Write how much money each person receives each month (before taxes), and check the Yes or No box if this person pays some of the living expenses.
- For **Average monthly expenses**, check the first box if you are estimating (best guess) expenses, or the second box if actual (exact) expenses. Check third box only if you expect these to be your expenses each month.
 - For a., check first box if you rent or the second box if you own your home. Fill in monthly payment. If you have a mortgage, fill out (1), (2) and (3). Fill our (4) and (5) if it applies to you.
 - Fill in amounts for b. through q. as they apply to you.
 - For j. and q., describe the expense.
 - Add lines a. through q., but don't add in mortgage principal and interest from line (a) (2).
 - Put this amount in the total expenses box, line r.
 - Line s. is monthly expenses for the household NOT paid by you.
- 19 List all installment payments and debts you may have. This could include car payments, credit card payments, etc.
 - First column: fill in the name of the creditor (who gets the payment?).
 - Second column: describe what the payment is for. Third column: amount of last payment to the creditor
 - Fourth column: amount still owed. Last column: date last payment was made.
- If you are represented by an attorney or you have paid money to an attorney, complete this section. If you have not paid any money to an attorney in this case, leave this section blank.
- 21 Do not fill out this section. Skip to next page....

RETTOKERPLANTEP RESPONSENT CHIEF PRENDICAMENT 22	GOLIONALIA
CHED SUPPORT BY ORDER (NOTE: Fill and this page only if your case in i. There (specify such 23 percent of their lare with me and if you're not save about precentagy on it has not been agreed on, plan if you're not save about precentagy on it has not been agreed on, plan	rolves shift support) her parent in this case. persent of their fine with the other parent.
Children's health care expenses	for the children firetagh any job.
 The monthly conflict the children's health fractions is or would be (a (the conflictable the amount your employer yays.) 	+ (8): \$
Additional expenses for the children in this case	Amount per month
Childrane so I can worker get job training.	
b. Children's health one not covered by incurance	
Theref expenses for visit discr. Children's educational or other special needs (specify below):	
 Opecial hardships, I writte coul to consider the following special forest (street documentation of any time lated time, including court orders): 	Amount per month — For how many months
Estimating the fifth expenses not included in 185	<u> </u>
 Major losses not covered by insurance (complex: fire, thet, other insured loss) 	
c. (f) Expenses for my minor children who are from other relationships a	nd .
an integrations (ii) Henses and ages of those children (specifit)	
(b) Child support I receive for those children	•
The expenses lided in a, b, and c create an extreme fluoristic handship be	acor (equiti):
Other information i want the court to izone concensing support in my	case (specific

INCOME AND EXPENSE DECLARATION (FL-150)

- page four -

DIRECTIONS:

- Find a number on the sample form *Example:* 22
- Go to the same number below to find out how to fill out the form
- ▶ Type or print in black ink
- ▶ If you know the CASE NUMBER fill it in. If not known leave it blank.

22 Print out first and last names for you and the other person(s) in this case.

Fill out the rest of this page only if your case involves child support.

- 23 Fill in the number of children you have with the other parent that are under age 18.
 - Estimate the amount of time the children are with you and with the other parent. Example: "The children are with me 30% of the time and with the other parent 70% of the time."
 - If unsure about using percentages, use the space provided to describe the parents' schedules for taking care of the children.
- Check the first box if your work place provides health insurance for your children. Otherwise, check the second box. Write the name and address of this insurance company in the space provided. Fill in monthly amount you pay (or would pay to fully cover the children) for health insurance. DO NOT include costs already paid by your job.
- 25 Fill in monthly amounts that apply to your case. Describe educational or special needs.
- 26 List any "special hardships" (things that make daily living hard).
 - For a. through c., fill in monthly amounts that apply.
 - In the second column, fill in the number of months the situation has lasted
 - If you have children under age 18 from other relationships, list their names and ages in the space provided.
 - If you get child support for these children, fill in that amount.
 - If you fill out lines a., b., and c., space has been provided to explain why it's hard for you to pay expenses.
- 27 In the space provided you may write other information you want the court to know about your case.

Blank Forms

(To be completed)

ATTORNEY OR PARTY WITHOUT ATTORNEY (Name, State Bar number, and address):	FOR COURT USE ONLY
TELEPHONE NO.:	
E-MAIL ADDRESS (Optional):	
ATTORNEY FOR (Name):	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF	
STREET ADDRESS:	
MAILING ADDRESS:	
CITY AND ZIP CODE:	
BRANCH NAME:	
PETITIONER/PLAINTIFF:	
RESPONDENT/DEFENDANT:	
OTHER PARENT/CLAIMANT:	CASE NUMBER:
INCOME AND EXPENSE DECLARATION	CASE NUMBER:
1. Employment (Give information on your current job or, if you're unemployed, your most	st recent job.)
a. Employer:	
Attach copies b. Employer's address: of your pay	
stubs for last c. Employer's phone number:	
two months d. Occupation:	
(black out e. Date job started:	
social f. If unemployed, date job ended:	
numbers). g. I work about hours per week.	<u></u>
h. I get paid \$ gross (before taxes) per month	per week per hour.
(If you have more than one job, attach an $8\frac{1}{2}$ -by-11-inch sheet of paper and list the s jobs. Write "Question 1—Other Jobs" at the top.)	ame information as above for your other
2. Age and education	
a. My age is (specify):	
b. I have completed high school or the equivalent: Yes Mo If no, h	nighest grade completed (specify):
c. Number of years of college completed (specify): Degree(s) obt	ained (specify):
	(s) obtained (specify):
e. I have: professional/occupational license(s) (specify):	
vocational training (specify):	
3. Tax information	
a. I last filed taxes for tax year (specify year):	
	iling separately
married, filing jointly with (specify name):	9
c. I file state tax returns in California other (specify state):	
d. I claim the following number of exemptions (including myself) on my taxes (specify	·)·
4. Other party's income. I estimate the gross monthly income (before taxes) of the other. This estimate is based on (explain):	r party in this case at (specify): \$
(If you need more space to answer any questions on this form, attach an 81/2-by-11-i	nch sheet of paper and write the
question number before your answer.) Number of pages attached:	
I declare under penalty of perjury under the laws of the State of California that the informat any attachments is true and correct.	tion contained on all pages of this form and
Date:	
<u> </u>	
(TYPE OR PRINT NAME)	(SIGNATURE OF DECLARANT)

FL-150 CASE NUMBER: PETITIONER/PLAINTIFF: RESPONDENT/DEFENDANT: OTHER PARENT/CLAIMANT: Attach copies of your pay stubs for the last two months and proof of any other income. Take a copy of your latest federal tax return to the court hearing. (Black out your social security number on the pay stub and tax return.) Income (For average monthly, add up all the income you received in each category in the last 12 months Average and divide the total by 12.) Last month monthly a. Salary or wages (gross, before taxes)..... d. Public assistance (for example: TANF, SSI, GA/GR) currently receiving\$_ from this marriage from a different marriage from this domestic partnership from a different domestic partnership \$___ Partner support L f. Pension/retirement fund payments....\$_ h. Disability: Social security (not SSI) State disability (SDI) Private insurance . \$_ Workers' compensation Investment income (Attach a schedule showing gross receipts less cash expenses for each piece of property.) Dividends/interest. \$_ b. Rental property income\$_ Trust income. \$_____ I am the ____ owner/sole proprietor _ business partner other (specify): Number of years in this business (specify): Name of business (specify): Type of business (specify): Attach a profit and loss statement for the last two years or a Schedule C from your last federal tax return. Black out your social security number. If you have more than one business, provide the information above for each of your businesses. 8 Additional income. I received one-time money (lottery winnings, inheritance, etc.) in the last 12 months (specify source and amount): 9. Change in income. My financial situation has changed significantly over the last 12 months because (specify): 10. Deductions Last month b. Required retirement payments (not social security, FICA, 401(k), or IRA)................................... d. Child support that I pay for children from other relationships......\$ e. Spousal support that I pay by court order from a different marriage.....\$_ Partner support that I pay by court order from a different domestic partnership g. Necessary job-related expenses not reimbursed by my employer (attach explanation labeled "Question 10g") \$ -11. Assets

c. All other property, L

___ real and

personal (estimate fair market value minus the debts you owe).... \$

	PETITIONER/PLAINTIFF:			CASE	NUMBER:		FL-15
	PONDENT/DEFENDANT: ER PARENT/CLAIMANT:						
	he following people live with me:						
		How the person is	That person's		ays some of the		
	Name	Age	related to me? (ex: son)	monthly inco	me h	ousehold expens	ses?
	a.					Yes	No
	b.					Yes	No
	C.					Yes	No No
	d. e.					Yes	No
L						1 es	INO
Α	verage monthly expenses	Estima	ted expenses Actu	ual expenses	☐ Propos	ed needs	
a.	Home:		h. Laundr	y and cleaning	1	\$	
	(1) Rent or morto	gage \$ <u>—</u>				\$	
	If mortgage:		j. Educat	ion	\$		
	(a) average principal: \$		k. Enterta	 k. Entertainment, gifts, and vacation \$ I. Auto expenses and transportation (insurance, gas, repairs, bus, etc.) \$ 			
	(b) average interest: \$						
	(2) Real property taxes	\$ <u> </u>					
	(3) Homeowner's or renter's insu		includo	include auto, home, or health insurance) \$			
	(if not included above)		n Saving				
	(4) Maintenance and repair	,	 o. Charita				
b.	, ,		p. Monthly	ted in item 14	Ψ		
c.	Child care	\$			pelow in 14 and insert total here) \$ pecify): \$		
d.	Groceries and household supplies	s \$ <u></u>	q. Other (specify):		\$	
e.	Eating out	\$	r. TOTAI	EYDENSES	(a–q) (do not a	add in	
f.	Utilities (gas, electric, water, trash) \$ <u></u>		nounts in a(1)(a		\$	
g.	Telephone, cell phone, and e-mai	I \$ <u></u>	S. Amou	nt of expense	s paid by oth	ers \$	
. In	stallment payments and debts no	ot listed above		nt or expense	o paid by our	υιυ ψ	
F	Paid to	For	An	nount	Balance	Date of last p	aymer
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			\$		\$		
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			\$		\$		
_ ⊢			\$		\$		

I confirm this fee arrangement.

(TYPE OR PRINT NAME OF ATTORNEY)	

•	
•	
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Date:

OTHE	ETITIONER/PLAINTIFF: ONDENT/DEFENDANT: R PARENT/CLAIMANT: CHILD SUPPORT INFORMATION	CASE NUMBER:	
OTHE 16. N u a.	R PARENT/CLAIMANT:		
16. N u			
a.	CHILD SUPPORT INFORMATION		
a.			
a.	(NOTE: Fill out this page only if your case involved	es cniia support.)	
D.	Imber of children I have (specify number): children under the age of 18 with the other process of the children spend process of their time with me and their time with time with the angle of the time with the time		og other parent
	The children spend percent of their time with me and percent (If you're not sure about percentage or it has not been agreed on, please de	cent of their time with the secribe your parenting s	•
17. Ch a.	nildren's health-care expenses I do I do not have health insurance available to me for th	ne children through my	job.
	Name of insurance company: Address of insurance company:	5 3	
d.	The monthly cost for the children's health insurance is or would be (specify (Do not include the amount your employer pays.)	<i>/):</i> \$	
18. A d	Iditional expenses for the children in this case	Amount per month	
a.	Child care so I can work or get job training	\$	
b.	Children's health care not covered by insurance	\$	
C.	Travel expenses for visitation	\$	
d.	Children's educational or other special needs (specify below):	\$	
	necial hardships. I ask the court to consider the following special financial cirtach documentation of any item listed here, including court orders): Extraordinary health expenses not included in 18b	rcumstances Amount per month \$	For how many months?
b.	Major losses not covered by insurance (examples: fire, theft, other		
	insured loss)	\$	
C.	(1) Expenses for my minor children who are from other relationships and are living with me	\$	
Th	(3) Child support I receive for those childrene expenses listed in a, b, and c create an extreme financial hardship because		

20. Other information I want the court to know concerning support in my case (specify):